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2017 PMP for Charlotte Shannon

Employee Information

First Name	Charlotte	Last Name	Shannon
People leader	Fritz O. Bissereth	Department	Cross Category (900000005)
Division	Consumer/Customer Care (200000005)	Position Title	Senior Representative, Trade Partner Support (70012732)

Introduction

The annual Performance Plan is used to document your individual performance objectives and the most important behaviors you need to demonstrate in order to achieve them. When setting your objectives, ensure there is alignment with the Whirlpool's Strategic Imperatives and the long-term priorities for your area. Meet with your People Leader throughout the year to discuss progress and, if necessary, to realign or reprioritize goals. At year-end, you and your Leader will review your achievements against your objectives and determine areas of strength and opportunities for continued development.

Objectives

Individual objectives are set annually, aligned with the Whirlpool's Strategy and Priorities. Your objectives should include three to five deliverables, as well as a commitment to execute your key accountabilities as outlined in your job description.

Deliverables: At the beginning of the year, agree on your focus for the year -- the three to five most important deliverables to advance the most important priorities for your area. Each deliverable should be specific, results-based and measurable (e.g., release product X by the end of Q3).

Accountabilities: At the beginning of the year, review the key accountabilities for your job. At year-end review the extent to which your key accountabilities were well executed. For more information about this process, please visit the My Whirlpool.

Performance

People-Aligned, Engaged, Accountable, and Capable

On Track

Objective Details

Objective	People-Aligned, Engaged, Accountable, and Capable	Objective Status	On Track
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Overall Results

Probability of Success High

-I have been in the Home Depot space since Oct.2, 2017. The first two weeks in this dept I worked half days.and only checked my emails for the days I was in the office

-3rd week in the dept, I completed 26 training modules to understand the Home Depot processes. Finished modules within the 3rd week.

-In November, the Front Office started a "Replacement" contest. At the beginning of the month I had 3 "Replacement" errors. By the end of November my error decreased to 0.

-As of Dec. 6, I have 2 "Cancellation" errors.

-Overall, I feel my adjustment to working in the Home Depot space has been a great adjustment. I am making less mistakes than some of the people who has been on the team for months. Adjusting well

Other Details

Targets

Target	Objective #1- ASA	Results	3 calls per hour
Target	Objective #1- AHT	Results	8
Target	Objective #1 -Productivity	Results	80%
Target	Objective #2-Talent Expansion/Growth	Results	Recently started working on the Home Depot team beginning 10/2/2017. Started taking calls Front Office calls for on 10/16/2017.Still developing and understanding the processes with the team.
Target	Objective #2-Talent Expansion/Growth	Results	Replacement Error Rate-Replacement Error Rate. Began the team with 3 replacement error rate, now at 0 replacement error rate. RGA Process began with 6 RGA errors, as of Dec. 6, 2017 error rate has decreased considerably.
Target	Objective #2-Talent Expansion/Growth	Results	MSE Support: N/A not an MSE
Target	Objective #2-Talent Expansion/Growth	Results	Multi Channel Functional: N/A

Target

Objective #2-Talent Expansion/Growth

Results

Continuous Improvement:I have pulled the chain once since starting the Home Depot Front Office. My chain pull was to remove the "sticky note" as a source of taking notes. The issue with using "sticky notes" in eCRM is once you exit out of eCRM the stick note with all the information inputted is deleted. I pulled the chain to see if it was more beneficial to use another source of taking notes that you can refer back to as oppose to sticky note in eCRM

Target

Objective #3-Talent Expansion/Growth

Results

Mentoring Program:Not mentoring, however I have been very instrumental in helping the new hires with understanding the Home Depot Front Office processes

Target

Objective #4-Talent Expansion/Growth

Results

Employee engagement survey score +2 - I finished the Employee Engagement survey which contributed to NAR (97%)

Performance

Process-Consistent Look and Feel Across Team

On Track

Objective Details

Objective

Process-Consistent Look and Feel Across Team

Objective Status

On Track

Overall Results

As the 2017 year began, I was very instrumental in my many roles to be apart of the Continuous Improvement process for the company. Not only did I help the company save money, eliminate waste, support my team mates to help improve and understand processes, I was also instrumental in stepping up and asking to be apart of other projects (GROW Session) to be even more instrumental in helping the company move forward with standard work and continuous improvement. It was a long year, and I face some challenges, however, I managed to come back to work, jump back in full force and be a part of the Home Depot Front Office team and be instrumental in learning their processes and helping other team members understand their processes as well.

Probability of Success High

Other Details

Targets

Target	Object #1: Flexibility/MSE Strategay	Results	The beginning of the year I worked for Retail Returns team. I worked Returns email as well and took the Return Front Office calls (when needed). Also trained order management team on how to process Returns email (fresh eyes).
Target	Objective #2: Team Structure	Results	At the beginning of the year while working in the Returns team, I attended Coaches training to understand how to simplify processes and how to approach peers with an issue. After training I became Back up Process Champion. Was constructive with pulling chain and helping team mates understand the "chain pull" process. Constructive in simplifying process in the stand work process.
Target	Objective #3: CI/SW Expansion - Completed 2 process	Results	While working on the Returns team, I pulled the chain on a process that eliminated 60 seconds within the process and saved the company \$12,000. I also pulled the chain on the scrap affidavit process. The Signature on File process would have saved the company a tremendous amount of money. It would have eliminated the person processing the scrap return from having to touch the email 3-4 times. Signature on File process would have only allowed the trade partner to touch the email once as well and the email rep to touch the email only once as well.

Performance

Team Structure - Drive out Complexity and Simplify

On Track

Objective Details

Objective	Team Structure - Drive out Complexity and Simplify	Objective Status	On Track
Overall Results		Probability of Success	High

Other Details

Targets

Target	Standardize	Results
Target	Group Like Work	Results

Performance
CI/SW Expansion

On Track

Objective Details

Objective	CI/SW Expansion	Objective Status	On Track
Overall Results	<p>*Presented at 2017 CI Network Event as Facilitator</p> <p>*Completed Coaches Training and applied tools for the four steps for achieving goals. How to instruct (Be the learner, not the knower)</p> <p>CI Network Ambassador for Retail Return to promote continuous improvement strategy within the team</p> <p>*Completed online Home Depot training</p> <p>*Training with Troy Schaffer for PIP Training</p> <p>*Project PIP Training</p> <p>*Pull the chain on scrap process</p> <p>*Meetings with CI Lean Lead on Scrap Affidavit process (SOF)</p> <p>*Meetings with Jacqueline Lin from Legal regarding adding Signature on file for the scrap process</p> <p>*Meeting with Sue Zvonar/Leadership regarding implementing signature on file for the Returns team</p> <p>*Trained Order management back office team members (fresh eyes) on Return email process</p> <p>*Received 2hr award for exemplifying "great" customer service</p> <p>*Performed administrative duties for Jason Case by reserving and booking meeting for Return teams from Jan-Aug. 2017.</p> <p>*Attended all coaches training</p> <p>*I have pulled the chain once since starting the Home Depot Front Office team. My chain pull was to remove the "sticky note" as a source of taking note. The issue with using "sticky notes" is once you exit out of eCRM the sticky note is deleted. I</p>	Probability of Success	High

pull the chain to see if we can use something other than "sticky note" to reserve information taken from the customer/GE via phone call. Again, my replacements rate has improved, Beginning Nov. 1st 2017 - I had 3 replacement errors, by the end of Nov., my error rate was 0. I feel a considerable improvement within a month of working on the Home Depot Front Office team. -I am not an MSE, however I have been instrumental in helping the new hires with understanding some of the Home Depot Front Office processes

Other Details

Targets

Target	Complete 2 processes per team	Results	
Target	Team 100% live with Standard Work	Results	
Target	Number of Chain Pulls	Results	
Target	Number of training events attended	Results	My Learning:I completed 26 Home Depot courses; registration; programs; surveys; curriculum requirements
Target	Process Champ for Team	Results	
Target	CI Ambassador	Results	I was a CI Amabassador until the CI team disipated

Performance
NAR Performance

On Track

Objective Details

Objective	NAR Performance	Objective Status	On Track
Overall Results		Probability of Success	High

Other Details

Targets

Target	Productivity Savings - \$50K	Results	NAR Performance Market Share: US 36.9%.Canada 34.5%. Mexico 28.4% Earned Operating Profit (EOP): \$350M (Quarter 3). 11.7% Free Cash Flow (FCF): \$289M (Quarter 3) Profitability for Growth (P4G): \$-28M Price Margin Realization (PMR): 0.0%
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Performance

Support ISC Road Map (Strategic Projects)

On Track

Objective Details

Objective	Support ISC Road Map (Strategic Projects)	Objective Status	On Track
Overall Results		Probability of Success	High

Other Details

Targets

Target	Return/Reorder Process	Results
Target	M-22 Project	Results
Target	Technology (Web World Chat)	Results
Target	CRM,Esker, EDI, Innowera	Results

Performance

Professional/Career Development

On Track

Objective Details

Objective	Professional/Career Development	Objective Status	On Track
Overall Results		Probability of Success	High

Other Details

Targets

Target	TBD by Individual, at least 2 targets required.	Results
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End of Year Feedback

End of Year Feedback occurs once a year to assess your individual performance objectives and the most important behaviors you demonstrated to achieve them.

During this step employee self assessment and People Leader assessment are documented. These should be recorded within each individual objective according to the EP&R criteria. At this point select a rating: Extraordinary Results, Very Strong Results, Strong Results, Results need to be Improved, and Unacceptable Results for each criteria.

For more information about this process, please visit the My Whirlpool.

Results vs Objectives

Unacceptable Results: Does not meet objectives

Results need to be **Improved**: Meets most objectives

Strong Results: Meets and/or exceeds objectives

Very Strong Results: Delivers results well beyond objectives

Extraordinary Results: Delivers break-through results

Employee Rating

Strong Results

Delivery of Results Based On Job Scope

Unacceptable Results: Does not deliver job scope

Results need to be **Improved**: Inconsistent delivery of job scope

Strong Results: Fully delivers at or above job scope

Very Strong Results: Fully delivers above job scope and succeeds in leading a major project

Extraordinary Results: Succeeds in leading a significant major project(s)

Employee Rating

Strong Results

Leadership Practices

Unacceptable Results: Leadership negatively impacts the team

Results need to be **Improved**: Inconsistent leadership

Strong Results: Provides consistent & positive leadership

Very Strong Results: Leadership impact positively benefits the team

Extraordinary Results: Leadership clearly lifts performance of others & team

Employee Rating

Strong Results

Demonstrated Whirlpool Values

Unacceptable Results: Does not live the Whirlpool values

Results need to be **Improved**: Lives the Whirlpool values

Strong Results: Consistently "lives" the Whirlpool values

Very Strong Results: Role model for Whirlpool values

Extraordinary Results: Role model for Whirlpool values across the enterprise

Employee Rating

Strong Results

Talent and Personal Development

Unacceptable Results: Individual does not own their personal development

Results need to be **Improved**: Inconsistent achievement of personal development objectives (Career Development Plan)

Strong Results: Meets and/ or exceeds personal development objectives (Career Development Plan)

Very Strong Results: Enhanced personal capabilities through execution of the Career Development Plan)

Extraordinary Results: Significantly enhanced personal capabilities through execution of the Career Development Plan

Employee Rating

Strong Results

Mid-Year Check In

Mid Year Check-In is the process in which People Leader and Employee review if the individual objectives are on track or behind according to the initial setting plan. The purpose of the session is to have a dialogue about the status of the objectives settled at the beginning of the year. The status of the objectives are "On Track" or "Behind".

For more information about this process, please visit the My Whirlpool.

Employee Self Assessment

People Leader Assessment

On track

Comments

* Comments by Jason D Case

Charlotte has done a wonderful job in the 1st half of the year by accepting and owning a lot of responsibility within the Retail Returns Space. Charlotte was the CI ambassador, she was a back-up PC for a short amount of time, she attended grow sessions to better understand critical thought and has done a great job taking phone calls along with answering emails. Charlotte is always willing to help the team where needed and is always in a positive mood. Charlotte will be transitioning to the HD team for the second half of the year so I expect for her to continue to show her great leadership traits while delivering great results for a new team.

* Employee Overall Assessment

Employee Overall Assessment provides the opportunity to document a summary of your results and any additional factors that should be considered in assessing your overall performance. This Overall Assessment should be based on EP&R criteria. For more information about this process, please visit the My Whirlpool.

Employee Rating

Strong Results

Since the beginning of the year (2017) I have been involved in many aspects of the company. These are the things that I have accomplished within this year. The first part of the year I started off with the Retail Returns teams. If I must say so myself I feel I did an "outstanding" job with the expectations of Whirlpool and the Whirlpool values.

*I was presented at the 2017 CI Network Event as a facilitator. We did a purchasing of product symulation that was generated from my idea. Everyone said the CI Open house symulation was a GREAT idea and it help everyone understand the processes.

*I was CI Ambassador for the Retail Returns Email team

*Attended Coaches Training to become back up Process Champion

*I was Back-Up Process Champion for the Retail Returns team

*I pulled the chain on many processes, one that included saving the company over \$12,000

*Pulled the chain on the scrap affidavit process (Signature on File). Created the new form to forward to customer when requesting a scrap affidavit.

*Created communication to distribute to trade partners on when Signature on File process would be implemented

*Met with CI Lean Lead on implementing the Signature on File proces

*Met with legal and leadership on implementing the Signature on File process to our trade partners. Signature on File process once implemented would have saved the company money.

*Trained order management team members on how to process Retail Return email (fresh eyes)

*Preformed administrative duties by scheduling dept meeting from Jan-Jun of 2017

*Attended Project PIP training

*Attended GROW sessions to better understand critical thinking

*Attended all coaches training

Employee Comments

Beginning October 2017 - I began working in Home Depot dept. Since I've started working in the Home Depot space, I have learned much of the Home Depot processes.

I struggled with the Replacement process as well as the RGA process.

*My error rate in Replacements at the beginning of Nov. in was 3.

*At the end of Nov. my error rate is now "0"

*My RGA rate has improved as well. My error rate went from 6 to now "0". I'm rocking in out. Now working on improving my average handle time.

Development Plan

Development Plan is the process of managing and structuring your career progress. People leaders should provide ways to facilitate your development and encourage you to drive your own career.

For more information about this process, please visit the My Whirlpool.